

FINGERTIP FACTS

**MANCHESTER
NEW HAMPSHIRE**

2004 EDITION

MANCHESTER MEANS BUSINESS!

THE MANCHESTER ECONOMIC DEVELOPMENT OFFICE CAN HELP YOUR COMPANY SUCCEED.

If your company is considering expanding or relocating here, the Manchester Economic Development Office can get you moving fast.

We provide comprehensive assistance to businesses, large and small, covering site selection, state and local permitting, general information and referral, and just about anything else your business may need. We'll help you cut through the red tape and focus on the important issues for your company's future.

Here are some other good reasons to locate your business here!

NEW HAMPSHIRE:

"Most Livable State" 2004 – Morgan Quitno Press

"#1 Healthiest State" 2004 – Morgan Quitno Press

"#4 Safest State" 2004 – Morgan Quitno Press

"#2 State in Child and Family Well-being" 2003 – 2003 Kids Count Data Book

"#4 Friendliest State for Small Business and Entrepreneurship" 2003 – Small Business Survival Committee

"2nd Lowest Tax Burden as a Percentage of Income" 2003 – Tax Foundation

NO GENERAL SALES OR EARNED INCOME TAX

MANCHESTER:

"#10 Best Small Metro Area for Doing Business in America" 2004 – Inc. Magazine

"#3 Best Economy" 2003 – World Economic Development Alliance

"#10 of Nation's Best Places to Live" 2004 – Men's Journal

If your business is just getting started or is on the grow, Manchester is a great place to be, and the Manchester Economic Development Office is ready to assist you.

For information, call (603) 624-6505 or e-mail us at econdev@ci.manchester.nh.us.

BASIC ECONOMY

Manchester has always been a city where business prospers. Once the site of the world's largest textile mill complex, the city today boasts an economy that is a diverse combination of manufacturing, service and retail firms. The history of Manchester is one of orderly growth, emphasizing the dual values of business prosperity and quality of life.

More than 200 diversified manufacturing firms call Manchester home. Nearly 70% of manufacturing jobs are in durable goods production, especially metal products, electrical products and machinery, and plastics. Manufacturing firms of over 150 employees in Manchester are:

Autodesk	CAD software
BICC General Corporation	electronic wire and cable
Electropac, Inc.	printed circuit boards
Freudenberg NOK	rubber products/seals
Harvey Industries, Inc.	windows and doors
Hitachi Cable Manchester, Inc.	electronic cables
Jewell Instruments, LLC	panel meters
Kalwall Corporation	fiberglass panels & skylights
Kana Communications	e-business infrastructure solutions
Ladesco, Inc.	custom coil winding
Moore-Wallace, Inc.	business forms and labels
OSRAM Sylvania, Inc.	HID lamps
Poly-Vac, Inc.	medical sterilization systems
RCD Components, Inc.	resistors & inductor coils
Rockwell International	photoelectric controls, software
Sanmina Corporation	printed circuit boards
Summit Packaging Systems, Inc.	aerosol valves
Texas Instruments	integrated circuits
Velcro, USA, Inc.	Velcro brand fasteners

Other major manufacturers located in Greater Manchester are:

Felton Brush, Inc.	industrial brushes
General Electric Company	aircraft engines
Vibro Meter, Inc	aircraft instruments & components
Poultry Products Co., Inc.	poultry processing
SCI Systems, Inc.	electronic assembly

Over 80% of the work force in the Manchester Metropolitan Statistical Area is employed in more than 2,000 nonmanufacturing firms, and Manchester is the financial and commercial center of northern New England. A few of the larger nonmanufacturing employers are:

Anthem Blue Cross Blue Shield	health insurance
Catholic Medical Center	health care
Citizens Bank	banking

Comcast Cable Communications	cable services
Elliot Hospital	health care
Bank of America	banking
Public Service of New Hampshire	electric utility
St. Anselm College	education
Southern New Hampshire University	education
U.S. Veteran's Hospital	health care
Union Leader Corporation	newspaper publishing
Verizon Communications	communications

The Manchester MSA also has over 8,000 commercial establishments, including more than 800 retail stores with annual sales of over \$2.6 billion (2002). Continuing expansion of financial and business services, supported by significant growth in population and personal income during the past decade, has contributed substantially to improvement of the area's economy.

Within the city and its surrounding towns there is a varied selection of business locations available:

Manufacturing (lease)	\$5.50-\$12.00 per sq.ft. per year
Manufacturing (sale)	\$30.00-\$50.00 per sq.ft.
Industrial land	\$75,000-\$110,000 per acre
Office (lease)	\$11.00-\$22.00 per sq.ft. per year
Retail (lease)	\$8.50-\$16.00 per sq.ft. per year

DEMOGRAPHIC DATA

The data below is for the federally-designated Manchester Primary Metropolitan Statistical Area, which consists of the City of Manchester and the towns of Allenstown, Auburn, Bedford, Candia, Goffstown, Hooksett, Londonderry, and Weare.

<u>Population</u>	1990	2000	2004(est)	
<u>2009(proj)</u>				
Total population	180,506	205,440	215,202	226,489
Sex				
Males	48.64%	49.11%	49.19%	49.24%
Females	51.36%	50.89%	50.81%	50.76%
Age				
Under 5	7.88%	6.75%	6.31%	6.10%
5-17	20.52%	19.05%	18.51%	18.13%
18-64	60.55%	63.28%	64.26%	64.36%
Over 64	11.05%	10.91%	10.92%	11.41%
Median age	32.1	35.5	36.4	37.1
Race - Non Hispanic	179,580	199,467	207,883	217,564
White	96.79%	95.67%	94.39%	92.91%
Black	0.64%	1.22%	1.55%	1.93%
Other	1.10%	3.10%	4.06%	5.16%
Hispanic Origin	2,679	5,994	7,319	8,905
Number of households	68,212	78,096	82,029	86,650
<u>Income</u>				
Households by income				
Over \$100,000	4.58%	13.57%	18.74%	25.76%
\$75,000 to \$99,999	6.96%	13.27%	14.94%	15.08%
\$50,000 to \$74,999	20.54%	23.45%	21.88%	19.85%
\$25,000 to \$49,999	37.85%	27.89%	25.15%	22.73%
Less than \$25,000	30.07%	21.82%	19.29%	16.59%
Per capita income	\$16,499	\$23,763	\$27,016	\$31,184
Median hshold income	\$38,113	\$50,305	\$56,345	\$63,460
Average hshold income	\$43,717	\$61,531	\$69,928	\$80,569
Median household EBI*	\$32,824	\$43,477 ₍₂₀₀₁₎	\$47,196 ₍₂₀₀₃₎	n/a
Retail sales(000s)*	\$1,952,206	\$2,455,000 ₍₂₀₀₁₎	\$2,533,470 ₍₂₀₀₃₎	n/a

*Source: Sales and Marketing Management, Survey of Buying Power 2003.

Source of all other data: Claritas, San Diego, California

LABOR

Manchester's labor force is industrious, providing "a day's work for a day's pay." Approximately 63% of the total population of New Hampshire lies within 30 miles or 35 minutes traveling time of Manchester, and the Metropolitan Area offers the largest supply of both skilled and unskilled labor in the state. The Manchester Primary Metropolitan Statistical Area civilian labor force numbers 121,060, and employment in all categories for residents of the Manchester MSA is 115,940 (March 2004). The PMSA's total nonfarm wage and salary employment is 109,400 (March 2004).

The minimum wage in New Hampshire is \$5.15 per hour. The average hourly rate for production workers in Manchester was \$16.13 (based on a 38.7 hour week) in March 2004. As is true for the state as a whole and all other major communities, per covered worker annual wages in Manchester are higher in goods producing industries than in service producing industries.

	All Workers-2002	Goods Producing-2002	Service Producing-2002
STATE	\$36,600	\$45,142	\$34,001
MANCHESTER MSA	\$37,780	\$42,623	\$37,040

The New Hampshire Department of Employment Security offers a complete one-stop employment service (www.nhes.state.nh.us) to both employers and job applicants.

The federally-funded New Hampshire Workforce Opportunity Council (www.nhworks.org) coordinates a variety of workforce development programs for both businesses and employees.

Fringe benefits practices of area companies vary, but in general they are as follows:

Number of paid holidays.....	6-10
Vacation	
After one year.....	2 weeks
After 5 years.....	3 weeks
After 15 years.....	4 weeks
Insurance	
Medical.....	Offered by 86% of firms
Dental.....	Offered by 75% of firms
Life.....	Offered by 54% of firms
Retirement programs.....	Offered by 67% of firms
Bonuses.....	Performance-based
Tuition assistance.....	Offered by 40% of firms

Manchester has consistently had one of the best records in the nation in terms of minimum hours lost through strikes. According to the NH Department of Employment Security, there were no labor disputes recorded in the Manchester Primary Metropolitan Statistical Area in 2003.

TRANSPORTATION

Manchester is well served by all forms of transportation.

AIR - Manchester Airport (www.flymanchester.com), a city-owned facility, is the largest and best-equipped airport in northern New England. Its main north-south runway is served by a full Category I Instrument Landing System with landing minimums comparable to Boston's Logan Airport (200 feet and ½ mile). Both runways have recently been lengthened; the main runway is 9,250 ft and the crosswind runway is 7,000 feet. A surveillance radar system greatly improves airport operational capacity during restricted weather conditions. Non-stop passenger service is provided regularly to over 15 cities in eastern and central US and Canada. Airlines serving Manchester include American Eagle, Air Canada, Continental, Delta, COMAIR/Delta Connection, Northwest, PanAm, United Airlines, US Airways, and Southwest.

A new 160,000-square-foot \$65.6 million passenger terminal complex was completed in December 1993, a 70,000 square-foot expansion was completed in 1999, and an additional 73,500 square-foot expansion was completed in 2004. The number of passengers increased from 1.10 million in 1997 to over 3.6 million in 2003. Wiggins Airways, the airport FBO, provides a variety of aviation services such as fueling, aircraft and avionics installation and repair. A Federal Inspections Services (FIS) facility, complete with full-time US Customs and USDA services for both passengers and air cargo, is also located at Manchester Airport. The industrial area surrounding the airport is a federally-designated Foreign Trade Zone.

SEA - The Port of New Hampshire in Portsmouth, 45 minutes east of Manchester via NH Route 101, is a year-round deep-water port. It is the site of a state-operated marine terminal, which can handle vessels up to 700 feet in length. The Portsmouth terminal is also a federally-designated Foreign Trade Zone.

HIGHWAYS - Manchester is the focal point of the state's highway system, facilitating easy access to all parts of New England, including Boston, Burlington, Portland, Hartford, and New York City.

PUBLIC TRANSPORTATION - Regularly scheduled bus service to Boston and other points is provided by Vermont Transit Lines and Concord Trailways. Local bus service is maintained by the Manchester Transit Authority, which operates a fleet of transit buses, school buses and several special-use buses.

FREIGHT - Manchester is served by the Boston and Maine Railroad. Motor freight service to all points is available from a number of nationally-known transport companies, and daily express service is maintained to all major cities within a 200-mile radius and New York City. United Parcel Service, Airborne Express, and Federal Express

provide daily small package air freight service from Manchester Airport, and have invested millions of dollars increasing ramp, sorting and distribution capabilities at Manchester. Overall airfreight has increased from 51 million pounds in 1991 to 161 million pounds in 2003. Manchester Airport is New England's third largest cargo airport.

FINANCING

Manchester is the major financial center for northern New England. Two of the region's largest commercial banks are headquartered here, and others have established branch offices. In addition, the Manchester area has several other sources of economic development financing.

Manchester is an entitlement Community for federal **Community Development Block Grant (CDBG)** funds from the U.S. Department of Housing and Urban Development; some of these funds have been used for various economic development projects. Manchester is also a federally- designated urban Enterprise Community. Businesses locating within the EC area may qualify for tax-exempt bond financing which is exempt from restrictions on financing the acquisition of land and existing property.

The City of Manchester operates a small **Revolving Loan Fund** that makes available financing for fixed asset acquisition and working capital for businesses located in or relocating to Manchester. Credit-worthy companies unable to access traditional financing may be eligible for these loans, which can be used only by businesses expecting to create new jobs for low-and moderate-income persons. Loans generally range from \$20,000-\$75,000 and market interest rates are charged.

The not-for-profit **Venture Capital Network**, located at the Massachusetts Institute of Technology, offers a computerized matching service that introduces entrepreneurs to private investors ("angels"), both for start-ups and new product development. Several New Hampshire venture capital funds, including **MerchantBanc Venture Partners, LP** in Manchester, provide equity financing to privately owned small business unable to obtain traditional financing of capital growth needs.

The Institute for Cooperative Community Development at Southern New Hampshire University operates **Capital Networks**, which provides technical assistance and small business loans to companies involved in flexible manufacturing networks. The New Hampshire Community Loan fund operates the **MicroCredit-NH** program that provides a growing line of credit to "micro" businesses participating in business loan groups.

The **U.S. Small Business Administration** operates a variety of business-assistance programs in New Hampshire. The SBA 7(a) Program guarantees bank loans to qualified small businesses that are unable to obtain traditional financing. The SBA 504 Loan Debenture Guarantee Program is designed to promote economic development by providing, in coordination with a private lender, 90% financing of fixed assets through three certified development corporations in the state.

The **New Hampshire Business Finance Authority**, a state agency, (www.state.nh.us/bfa/bfa.htm) operates several programs aimed at encouraging economic development in the state. The BFA offers the following initiatives: 1)guarantees on loans to businesses made by banks and local development organizations; 2)companion loans to loans

guaranteed in part by the U.S. Small Business Administration; 3) cash reserves on loans made by state banks to businesses with annual revenues less than or equal to \$5 million; 4) opportunities for local development organizations to acquire additional funds for the purpose of promoting and developing business in the State; and 5) guarantees on portions of working capital lines of credit up to \$2 million. The BFA also has the authority to issue tax-exempt industrial revenue bonds (IRBs) of over \$1 million to credit worthy manufacturers.

The State of New Hampshire also offers, through its Community Technical College system, the **Job Training Program for Economic Growth** that may pay up to 50% of training costs for eligible companies.

Other financing programs available to New Hampshire businesses include assistance to firms hurt by export competition, assistance to inventors and small businesses with promising energy-related inventions, state-subsidized matching grants for technical assistance with product and/or process research and development and technology deployment, and loan guarantees and assistance for exporters.

Because of these and other financial vehicles, Manchester is in a position to creatively tailor financing for a variety of projects.

BUSINESS SERVICES

The **Amoskeag Business Incubator**, a joint venture between the Southern New Hampshire University School of Business and the City of Manchester, provides real estate space and technical assistance to new, start-up and fledgling small businesses.

The **Small Business Development Center** (www.nhsbdc.org), a joint project of the University of New Hampshire and the U.S. Small Business Administration, provides no-cost business counseling for new and small businesses in the state. An office of the SBDC is located at the Amoskeag Business Incubator.

The **New Hampshire Industrial Research Center** (www.nhirc.sr.unh.edu), a cooperative project of three major universities and the State of New Hampshire, offers programs to assist New Hampshire industry competitiveness. The NHIRC provides assistance in basic and applied R & D and manufacturing improvement, market research assistance, money-saving Design of Experiments courses and low-cost assistance to inventors.

The **New Hampshire International Trade Resource Center** (www.globalnh.org) at the Pease International Tradeport in Portsmouth works with New Hampshire companies interested in initiating or expanding their export efforts with a full spectrum of information, programs and customized services, including an extensive international business library.

Centers for Training and Business Development, located at the New Hampshire Community Technical Colleges, provide assessment and workforce training for New Hampshire businesses. These services include customized training programs, customized certificate programs, fully accredited courses and programs, corporate universities, and community school-to-work initiatives.

The **Manufacturing Management Center** offers technical, business and financial counseling to small manufacturers, and enlists the University of New Hampshire faculty and resources to deliver specialized services on an as-needed basis.

SBA-sponsored **Small Business Institutes** at the University of New Hampshire, Plymouth State College, Keene State College, New Hampshire College and Daniel Webster College provide in-depth management consulting services to local small businesses using senior-level undergraduate and graduate students enrolled in a business administration curriculum. A chapter of the **Service Corps of Retired Executives (SCORE)** is located in Manchester.

The **New Hampshire High Technology Council** sponsors a Business Clinic and co-sponsors the MIT Enterprise Forum. These provide opportunities for emerging businesses to have their business plans critiqued by a panel of experts.

Several other specialized business assistance programs are offered by the State of New Hampshire's Department of Resources and Economic Development (www.nheconomy.com).

Additional resources can be found at www.buzgate.org, a collaborative resource portal linking businesses with local business assistance programs and other resources to help them start, grow and succeed.

EDUCATION AND INFORMATION

The Manchester public school system consists of 14 elementary schools, four middle schools and three high schools with a total 2003-04 enrollment of 17,655 students. A comprehensive special education program provides services from pre-school through high school for learning disabled, mentally retarded and emotionally disturbed children, as well as programs for the deaf and non-English speaking students. Renovations to a number of existing school buildings and the construction of a new middle school have been carried out in recent years. During 2003-2006 the City will complete a comprehensive \$105 million construction project to rehabilitate all elementary, middle, and high schools in the Manchester School District and construct additions to all three high schools and two middle schools. The Manchester School of Technology provides training in a variety of vocational skills to high school students from Manchester and two adjacent towns. In addition, Manchester has a complete parochial school system consisting of five elementary schools, one junior high and one high school with a total enrollment of 2,087 students. The Derryfield School, a private co-educational school for grades 6-12, enrolls 378 students.

The public high schools offer comprehensive programs to meet all interests and abilities. Over 50% of the graduates go on to post-secondary education. For the past decade, New Hampshire's students have had one of the highest average SAT scores in the nation among states in which 40% or more of eligible students participate.

The Manchester area has seven colleges and universities, including the University of New Hampshire at Manchester, Southern New Hampshire University, St. Anselm College, and Hesser College. The Center for Training and Business Development at the New Hampshire Community Technical College at Manchester provides workforce training and development to meet the customized training needs of area business and industry. Manchester also has numerous specialized schools and a program of continuing education courses conducted by the School of Lifelong Learning at the University of New Hampshire.

In addition to local educational opportunities, the New Hampshire Technical Institute (Concord), Dartmouth College (Hanover), the University of New Hampshire (Durham), and others are located nearby in the state, and Lowell Technological Institute, Harvard University, Boston University, Northeastern University, Massachusetts Institute of Technology and others are located in Massachusetts less than an hour's drive away.

Manchester has among its many cultural assets the largest municipal library and the widest range of visual and performing arts organizations in Northern New England. **Science Enrichment Encounters (SEE)** is an interactive science learning center targeted to young

people which seeks to develop an awareness of and interest in all areas of science. The impressive listing of cultural organizations begins with the **Currier Museum of Art**, which houses a nationally-recognized collection of fine and decorative arts. The Currier also owns and offers public tours of the **Zimmerman House**, designed in 1950 by Frank Lloyd Wright. The **Manchester Historic Association's Millyard Museum** in the Amoskeag Millyard features the history of Manchester and the people who have called it home, from the Native Americans who fished at the Amoskeag Falls to the thousands of employees of the Amoskeag Manufacturing Company, to current businesses and residents. The **New Hampshire Institute of Art**, a degree-granting institution, offers adult courses in fine and applied arts, and the city hosts an array of art galleries featuring fine art as well as fine crafts. Performing arts are centered around the **Palace Theatre**, a restored turn-of-the-century theatrical landmark. Two orchestras, The New Hampshire Symphony Orchestra and The New Hampshire Philharmonic Orchestra, professional opera productions sponsored by the Opera League of New Hampshire, and a wealth of dramatic and musical events all "play the Palace" each year. In addition, local colleges offer venues for entertainment including national touring company performances, films and lecture series.

A daily paper, ***The Union Leader***, and a Sunday paper, ***The New Hampshire Sunday News***, are published by the Union Leader Corporation. A weekly paper, the Hippo Press, is also published in Manchester. Four radio stations and an ABC-affiliated television station (WMUR-TV) provide a variety of local and national programs. Cable television service is provided by Comcast Cable Communications.

LOCAL TAXES

1. Real Estate and Property Tax

NH Revised Statutes Annotated 72-7 defines real estate as lands, buildings, etc. Effective April 1, 1999 New Hampshire's property tax system includes a state education property tax which will be assessed and collected by local municipalities by assessing an amount equal to \$5.49 per \$1,000 of total equalized value of all non-utility property in the community.

2004 tax rate (Manchester).....\$26.40 per \$1000.

A revaluation of all city properties was completed in 2001.

2. Other Taxes and Fees

a. Auto Registration Permit: 1st year \$18, 2nd year \$15, 3rd year \$12, 4th year \$9, 5th year \$6, and thereafter \$3 per \$1,000 of factory list price. In addition, the City of Manchester charges a waste reclamation fee of \$5 for vehicles weighing over 18,000 pounds, \$3 for passenger vehicles, and \$2 for trailers, motorcycles and mopeds.

b. Building Permits: assessed by City Building Department with fee varying according to type and amount of work permitted. Specifications are based upon 2000 International Building Code provisions.

c. Sewer Entrance Permit: commercial/industrial, \$250-300; residential, \$150-200.

d. Municipal Licenses: includes special business permits (theaters, dance halls, junk dealers, wood dealers, private employment agencies, taxicabs, taxi drivers and stores operating on Sunday), marriage licenses, dog licenses and filing fees for candidates for local offices.

STATE TAXES

New Hampshire is the only state in the continental United States which has neither an earned income nor a general sales tax. A tax on income from interest and dividends exceeding \$2,400 per taxpayer per year is assessed at a rate of 5%.

1. **Business Enterprise Tax** at a rate of 0.75% of the "taxable enterprise value" of every business enterprise having gross business receipts in excess of \$150,000, or having an enterprise tax base-- compensation, interest and dividends--over \$75,000. Amounts paid under the BET may be credited against the Business Profits Tax.

2. **Business Profits Tax** (RSA Chapter 77-A) on "taxable income before net operating loss deduction and special deductions" at the rate of 8.5% on any enterprise "organized for gain or profit, carrying on any business activity within the State, except such enterprises as are expressly made exempt under the Internal Revenue Code."

3. **Unemployment Compensation Tax** levied on employers having one or more workers for at least 20 weeks or gross wages of at least \$1500 in any calendar quarter of 1972 or thereafter. Employers pay a tax on the first \$8000 of each employee's earnings. The initial rate for new enterprises is 2.7% with a variable fund balance reduction allowance that may be applied to rates, depending upon the balance of the New Hampshire Unemployment Compensation Fund. A merit rating formula, when in effect, begins after 2 1/2 years of coverage, and rates assigned each July 1st represent the individual employer's payroll experience. The average rate in 2003 as about 1.2%

4. **Communications Services Tax** of 7% on all two-way communications, with the first \$12 of local residential phone bills exempt.

5. **Corporation Fees:**

a. Domestic Corporations	
1. Articles of Incorporation.....	\$35.00
2. Addendum to Articles of Incorporation.....	\$50.00
3. Annual report fee.....	\$100.00
b. Foreign Corporations	
1. Certificate of Authority.....	\$35.00
2. Addendum to Application for Certificate of Authority.....	\$50.00
3. Annual report fee.....	\$100.00

Most costs of state government are met by excise taxes on gasoline, pari-mutuel betting, liquor and beer, tobacco products, an 8% Meals and Rentals Tax and the Business Profits and Business Enterprise Taxes. Highway construction and maintenance and most motor vehicle enforcement are paid for by road tolls, gasoline taxes and motor vehicle license and registration fees (based on vehicle weight). Revenue derived from state-operated sweepstakes is used for state aid to education and is distributed to towns and cities on a per capita basis.

UTILITIES

COMMUNICATIONS - Telephone service in the Manchester area is furnished by Verizon Communications. The company's state headquarters, the New Hampshire/Vermont accounting operations, and the market area center are in Manchester. To keep pace with and stay ahead of the growing demand for telephone service, the company has installed a 100% digital network that offers services such as ISDN to more than 120,000 miles of fiber optics spanning the state. Verizon experts have integrated key components in developing strategic business applications for improved Network Management, disaster recovery planning, information systems enhancement, telemarketing programs, cellular services and more. All major long distance carriers maintain Points of Presence in Manchester. Cellular telephone and voice mail services are provided in Manchester by several private companies.

GAS - Keyspan, Inc. distributes natural gas and propane to customers in southern and central New Hampshire, including the Greater Manchester area. The company offers a number of different rates and services to residential, commercial and industrial customers. For customers wanting to purchase their own gas supplies, the company offers a full menu of transportation rates. The company also maintains a well-trained service department and a central dispatch center that is staffed 24 hours a day, 365 days a year. In areas where natural gas is not available, the company supplies propane to more than 10,000 customers in any required volume at wholesale and retail prices.

POWER - Public Service of New Hampshire is the utility serving the Manchester area with electric power. Its industrial power rates (GV and LG) compare favorably with similar rates of other companies in the Northeast. Companies considering relocation or expansion in the Manchester area should contact the Economic & Community Development Manager at PSNH (634-2386) for more detailed information.

WASTEWATER - The City of Manchester has over 300 miles of public sewer available to existing and potential users and a modern 34 million gallon per day secondary treatment plant. Prospective businesses can contact the Environmental Protection Division of the Manchester Public Works Department at 300 Winston Street (624-6513) for further information concerning the program, permits and costs. The owners of all properties that are connected to the municipal sewer system are required to pay the following quarterly user charges:

SERVICE CHARGES

One or more dwelling units.....	\$7.00-11.00 per unit
Commercial establishments.....	\$15.00 per establishment
Industrial establishments.....	\$31.00 per establishment

USER CHARGES

Residential and commercial.....\$1.55 per 100 cubic ft.
(748 gal.)of water consumed

Industrial	Volume.....	\$1.46 per 1,000 gallons
	B.O.D.....	\$14.19 per 100 pounds
	Suspended solids...	\$13.93 per 100 pounds

WATER - The water supply of Manchester is city-owned and controlled, and its quality is excellent for both industrial and domestic purposes. Lake Massabesic and its forty-two square mile watershed has an estimated safe yield of 20.5 million gallons per day and an average daily consumption of 17.4 million gallons per day. An award-winning 40 mgd. water filtration plant is further enhanced by an on-going enlargement of both the supply and distribution systems. A major upgrade of the 27-year-old treatment plant, which will replace filters, expand capacity and improve the treatment process, is in progress. City water has an average pH value of 6.5, a total hardness of about 12 mg/l, and is low in total solids and turbidity. Current water rates are as follows:

First 60,000 cu. ft.....@ \$ 0.94 per 100 cu. ft.
Over 60,000 cu. ft.....@ \$ 0.75 per 100 cu. ft.
Quarterly service charge.....\$15.79 - \$538.36, depending
upon meter size

There is also a Private Fire Service Rate, a demand charge for water service to sprinkler systems. The charge is based on the size of the entrance pipe and varies from a minimum of \$2.21 per quarter for a 1.5-inch pipe to a maximum of \$524.23 per quarter for a 12-inch pipe.

METROPOLITAN AREA DATA

The Manchester Metropolitan Area (10 mile radius), located in the heart of the Merrimack Valley in south central New Hampshire, is the industrial, wholesale, retail and business service center of New Hampshire and much of northern New England. It comprises seven towns in Hillsborough County, six in Rockingham County and five in Merrimack County, and accounts for over 25% of the population of the state.

Manchester is the largest city in New Hampshire and the core city in one of the three federally designated PMSA's in the state. According to U.S. census figures, the Metropolitan Area, with 19 communities in 3 counties, contained 162,094 persons (22.0% of the state total of 737,681) in 1970, while the 2002 figures show a 32-year Metropolitan Area increase of 96.9% to 319,083 (25.1% of the state total of 1,275,000).

MANCHESTER AREA POPULATION

Year	Manchester City		Manchester Metro Area*		Manchester Trade Area*	
1970	87,754		162,094		335,707	
		+3.6%		+30.1%		+29.1%
1980	90,936		212,246		433,543	
		+9.5%		+26.5%		+26.4%
1990	99,332		268,564		548,037	
		+7.7%		+15.5%		+13.8%
2000	107,006		310,304		628,386	
		+1.1%		+2.8%		+3.2%
2002(est)	108,150		319,083		648,355	
		+9.7%		+11.0%		+9.7%
2010(proj)	118,630		354,280		711,170	
		+7.2%		+10.5%		+10.0%
2020(proj)	127,140		391,480		782,190	

*MANCHESTER METRO AREA (10-mile radius): Manchester, Allentown, Amherst, Auburn, Bedford, Bow, Candia, Chester, Derry, Dunbarton, Goffstown, Hooksett, Litchfield, Londonderry, Merrimack, New Boston, Pembroke, Raymond and Weare.

*MANCHESTER TRADE AREA (20-mile radius): METRO AREA and Atkinson, Brentwood, Brookline, Chichester, Concord, Danville, Deerfield, Deering, Epping, Epsom, Francestown, Fremont, Greenfield, Hampstead, Henniker, Hollis, Hopkinton, Hudson, Kingston, Loudon, Lyndeborough, Milford, Mont Vernon, Nashua, Northwood, Nottingham, Pelham, Plaistow, Salem, Sandown, Wilton, Windham.

SOURCES: Population - U.S. Census 1970, 1980, 1990 and 2000.

Population Estimates and Projections - NH Office of Energy
and Planning.

COMMUNITY DATA

ENVIRONMENT - The Merrimack River bisects the city. The elevation of the city's lowest point is 110 feet above sea level and the highest point is 570 feet. The surrounding countryside is largely rural and wooded, with numerous large and small bodies of water.

Average daily temperatures range from 14.8 degrees Fahrenheit in January to 70.0 degrees Fahrenheit in July with an annual average of 47 degrees. Rainfall varies from an average of 2.66 inches in February to 3.62 inches in July with an annual monthly average of 3.28 inches. Annual snowfall averages 60.6 inches (60 year mean total). Average year-round humidity is moderate.

Manchester's environmental quality is excellent for business and recreational activities throughout the year. The city's water supply is of consistently high quality for both industrial and domestic purposes. There are no significant pollution or smog problems, nor are there any recorded hazardous waste disposal sites in the area.

GOVERNMENT - The City of Manchester is governed by a Mayor and 14 Aldermen who approve the municipal budget, raise money for it, enact and amend ordinances, nominate and elect most city officials and commissions. The Finance Committee of the Board of Mayor and Aldermen has general supervision and control over the expenditure of all money appropriated by the city. Manchester currently maintains an "Aa" rating on its bond issues as graded by Moody's Investors Service, Inc.

POLICE AND FIRE - According to FBI reports, the crime rate in Manchester is lower than in U.S. cities of comparable size, and since 1993 the number of crimes has decreased by 35%. A 202-officer, 78-civilian Police Department and a community Crime Line cooperate in making the city a safe place to live and do business. A citywide program of Community Oriented Policing Services (COPS), including six police substations, was instituted in 1995. Police officers in the COPS program regularly patrol on foot and bicycle and interact with local residents.

The Department of Fire Protection operates ten stations strategically placed throughout the city, staffing 11 engines, six aerial trucks, and a rescue/hazardous materials response truck with 243 employees. The department has primary responsibility for fire fighting, inspections, hazardous materials response, investigations, and emergency management, and maintains a Class II ISO rating, the highest in New Hampshire. Fire fighting capabilities are being further enhanced through the introduction of a Compressed Air Foam System. The department also serves as the Emergency Preparedness Office for the city, coordinating emergency response procedures with other federal, state, and local agencies. The department also serves as the city's "first responder" for emergency medical services and administers the city's contract with a private emergency medical services provider.

HEALTH - The City Health Department and the area medical community work together to maintain the city's excellent health conditions. There are three hospitals in Manchester. Elliot Hospital is a full-service, acute care hospital with more than 1,600 employees and 296 beds. Specialized services available at Elliot include oncology services, a Level 2 regional trauma center, comprehensive women's and children's health programs including a newborn intensive care unit, a pain management center, rehabilitation and occupational health services, senior health services, and behavioral and psychiatric services. Catholic Medical Center is a full-service acute care hospital with more than 1,300 employees and 300 beds. Specialized services available at CMC include the Center for Sleep Evaluation, comprehensive rehabilitation services, psychiatric services, and the New England Heart Institute. A Veterans Administration Hospital is also located in Manchester.

The Hitchcock Clinic, founded in 1927 and a component of the Dartmouth Hitchcock Medical Center, operates a medical care facility in Manchester. The Manchester Community Health Center provides primary care services to low income persons, and Child Health Services, a non-profit pediatric clinic, provides comprehensive health care services to low-income children. Visiting Nurse Services offers home health services to area residents, including hospice, maternal-child health, and IV therapy.

The Mental Health Center of Greater Manchester provides in-patient care for acute cases, day hospital programs for out-patient diagnostic and treatment services for children, adolescents, adults, the elderly and alcoholics, emergency services (24 hours a day), consultation, and community education.

ECONOMIC DEVELOPMENT - Manchester continually plans for and invests in its future. The Manchester Economic Development Office, a city department, promotes the attraction and retention of businesses in Manchester and carries out a variety of economic development activities. The Office also provides technical assistance and advice to public policy and regulatory bodies and to business and industry seeking to locate to or expand in the area, and provides marketing and information services to the public and private sectors.

The Office of the Mayor, the City Planning and Community Development Department, and other municipal service departments initiate and carry out capital and service improvement projects in accordance with Manchester's Five-Year "Community Improvement Plan," while the Greater Manchester Chamber of Commerce works on a broad program to benefit the city's business community.

Intown Manchester Management, Inc., a non-profit entity established to promote the revitalization of Manchester's downtown, is funded through fees levied on downtown property owners. Recent projects have included a façade improvement program and numerous public events and activities.

In cooperation with the City of Manchester, the Manchester Housing and Redevelopment Authority carries out programs in public housing and community redevelopment, having completed 12 major projects including three industrial parks and a number of downtown revitalization projects.

Manchester has earned a reputation for creative approaches to planning, financing, and execution of a variety of economic development ventures to promote quality and diversity in its business environment.

RECREATION - Manchester offers a wide variety of recreational activities. There are 900 acres of parks and playgrounds in the city, four public swimming pools, and one public beach. A number of baseball, softball, and soccer leagues make use of the many fields maintained throughout the city. Local organizations offering social and athletic activities include the YMCA, City Parks and Recreation Department, Girls' and Boys' Club, Boy Scouts and Girl Scouts. Manchester also has three golf courses, four bowling alleys, and numerous movie theaters. There is boating and fishing on Lake Massabesic, which supplies the city's drinking water, and other lakes and streams in the area.

The Atlantic coast is less than an hour's drive away, as are the White mountains in northern New Hampshire. McIntyre Ski area, owned by the City of Manchester, is lighted, has snow-making capabilities, two double chairlifts, a pony lift, snow tubing, and runs up to 1,000 feet long. Gill Stadium, which recently underwent major renovations, is fully lighted and has a maximum seating capacity of 6,000.

Manchester's new Verizon Wireless Arena, a 10,000-seat, \$60 million facility, opened in November 2001. The arena is home to the Manchester Monarchs AHL hockey team and the Manchester Wolves arena football team and is the venue for a variety of events year-round, including concerts, ice shows, and sporting events.

In May 2004 groundbreaking ceremonies were held for a City-owned 6,000-seat, \$27.5 million baseball stadium that will be the new home of the Toronto Blue Jays-affiliated New Hampshire Fisher Cats. The 2005 Fisher Cats season will open at the new stadium in April 2005.

DOWNTOWN - Manchester has a multiservice professional and business district in the city's downtown. The focal points of the central business district are the 10,000-seat Verizon Wireless Arena and City Hall Plaza, a \$19.5 million, 284,000-square-foot, 20-story office tower, the tallest in New Hampshire, which houses the New Hampshire headquarters of Verizon Communications. Other major projects include Wall Street Tower, a 12-story residential apartment tower with a 600-car parking garage; the Hampshire Plaza, which includes a 616-car municipal parking garage, a 20-story office tower and an enclosed shopping mall; and the \$40 million Center of New Hampshire, which includes a 250-room hotel, a convention center, a 1010-car municipal parking garage, a 105,000 square foot office building, an exhibition

center, and an urban transit facility. In addition, a number of rehabilitations have been carried out in existing buildings in the downtown area.

SHOPPING - Manchester has some of the major shopping facilities in northern New England, including a major commercial area in the southeast section of the city where the Mall of New Hampshire is located. The Mall recently completed a major expansion. Retail development in nearby Bedford provides additional shopping opportunities, including the Bedford Mall and Macy's.

LODGING AND HOUSING - There are 15 hotels and motels located in the Manchester Metropolitan Area with a total of over 1,500 rooms. Within the city and its surrounding communities, there is housing for both workers and executives. Many new housing projects have been completed over the past five years, and over 8,000 multi-family units have been constructed since 1980.

Manchester offers its residents the dual advantage of urban facilities surrounded by a healthy, spacious, rural countryside only minutes from the city's center.

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